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ABSTRACT

Presented is Stage II of the Comprehensive Approach to Pupil Planning (CAPP) System, a three-stage model for planning educational interventions in the regular and special education classrooms and for guiding placement decisions. The guide focuses on the evaluation services performed by the Planning and Placement Team (PPT) with sections on the following: Stage II personnel; roles and responsibilities of PPT members; forms for sharing student assessment data; and PPT meeting agenda (which includes determining eligibility for special education services, a review of services provided, and identification of instructional and related resources required to implement selected strategies). Appended are requirements and suggested forms for parental notification and consent, forms for sharing student assessment data, and a special education dismissal form. Also provided is a PPT meeting agenda booklet. (SBH)

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COMPREHENSIVE APPROACH TO PUPIL PLANNING
STAGE II
PLANNING AND PLACEMENT

Experimental Edition

Frances Stetson Vlasak
Martin J. Kaufman

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This is Stage II of a three stage model for planning educational interventions in the regular and special education classrooms and for guiding placement decisions.

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OVERVIEW

Within the past two years, special education administrators, state departments of education, and the United States Congress have focused increased attention and effort on the development of appropriate educational opportunities for all handicapped children. This reflects an increased concern for the quality of administrative and instructional procedures, instructional and related service programming efforts, and accountability for all aspects of education.

Recently enacted legislation at both the state and national levels requires careful examination of current policies and procedures regarding the identification, evaluation, and provision of services to handicapped students. Processes must assure that as children who may require special assistance are identified, the rights of the child and his/her parents are safeguarded; they must also assure that educational decisions concerning the child's future are determined in a comprehensible, thorough, and equitable manner.

Research studies conducted in the past two years reveal the need for increased awareness and acceptance of the changing roles and responsibilities of educational personnel, the need for more formalized procedures, and the need to increase the efficiency of group decision making. Frequently, educators are not aware of the responsibilities they are expected to undertake as they evaluate student abilities, serve as members of Planning and Placement Teams (PPTs), implement educational programs, and review student progress. Often, these procedures are carried out in a random, rather than a systematic manner; actions and considerations which must be guaranteed to students frequently occur — or fail to occur — by chance rather than by design. For example, videotape studies revealed that placement decisions are often reached without benefit of discussion of student needs or determination of eligibility.

The CAPP Model has been designed to provide a rational and flexible approach to facilitate the educational decision making process. Basically, the approach involves clearly identifying the problem, generating and reviewing alternative interventions, and selecting the most appropriate intervention. Through the formalization of activities, the CAPP materials assure that three basic goals are realized:

- decision quality is increased as a result of formalizing and structuring the activities,
- efficiency is increased through the most cost-effective utilization of time and personnel, and
- higher-level commitment to the decision is obtained as a result of greater involvement of the child's parents and school personnel.

The CAPP Model is initiated when a classroom teacher requests assistance in meeting the needs of a student who has failed to perform in the manner expected of him/her in the regular education program. CAPP materials guide instructional and supportive personnel through the process of identifying areas of concern, examining the current instructional program, and selecting alternative strategies for meeting the student's needs. If, after alternative strategies have been utilized and evaluated in the regular classroom, it is determined that the student may require more in-depth evaluation and special assistance to meet his educational needs, a meeting is held and he/she is then referred to the Planning and Placement Team (PPT). The system was designed with the recognition that each student experiencing difficulty in the regular education program must be assured that every effort will be made to meet his/her needs within his/her current regular education program prior to and following referral for special education services. This assurance protects each student's right to be educated in the *least restrictive environment* and clarifies the responsibility of the regular education program.

If it is determined that modifications of the student's regular program have not enabled him/her to perform at the level expected in the regular classroom, the student is referred for comprehensive evaluation and consideration for special education services by the Planning and Placement Team. This referral marks the beginning of Stage II of the CAPP Model The decision which is ultimately reached by the PPT is a crucial one, often affecting the student and his/her parents for a lifetime. Thus, the *guarantee of procedural safeguards* is of utmost importance. The Stage II form, the PPT Meeting Agenda, is structured to assure that the actions of professional educators culminate in the best decisions for children. Educators seek to assure that sound and ethical practices are followed as they review student assessment data, ascertain eligibility for services, explore placement options, and finally, identify the specific program which best suits the student's instructional and related service needs. At this time, the PPT also sets long-range goals for each student who is determined eligible for special education services.

During the third and final stage of the CAPP Model, the instructional staff responsible for implementing the student's educational program must develop an instructional plan which outlines teacher responsibilities and provides a framework for reviewing student performance. The instructional plan provides a structure for assuring

that the specific instructional units lead to the attainment of the long range goals described in the need statements which were developed by the PPT during Stage II. This final planning effort facilitates the provision of a *free and appropriate public education* for all handicapped children.

Thus, three major issues have been considered in the development of the materials:

- the concept of least restrictive environment,
- the guarantee of procedural safeguards, and
- the assurance of a free and appropriate education.

Educational accountability enables us to document our efforts and our achievements as we strive to achieve these goals. Educational accountability, then, is not the catch-phrase of the future but an integral facet of current school practice. The Comprehensive Approach to Pupil Planning provides data for evaluation of current programming efforts and for the planning and design of future programming components. The data available from these materials provides documentation for requests to local school boards and state legislatures for additional funding, provides information regarding the most efficient staffing patterns and maximum utilization of resources, and reveals dysfunctions at the system and building levels which, when corrected, result in increased efficiency and cost-effectiveness. Thus, the conceptual shift toward emphasis on *quality* becomes an operational reality and a free and *appropriate* public education for all handicapped children is clearly in attainable goal.

The CAPP system .....

assures consideration of the least restrictive educational environment for each student

assures that the rights of each student are protected by formalizing all planning and placement team activities

facilitates parental involvement in the decision-making process

requires consideration of cost-effective strategies for delivering educational and related services

is based on extensive research of current practices in the planning and placement team process in the state of Connecticut

utilizes a formalized agenda which increases efficiency and decreases repetition and meeting time

provides a format for the record of the PPT meeting

assures compliance with Connecticut statutes and state educational agency policy and procedures

assures compliance with Public Law 94-142

provides the state management information system with data required for state and federal government planning, evaluation, and reporting

STAGE II INTRODUCTION

The decision which is ultimately reached by the Planning and Placement Team is a crucial one, often affecting the student and his parents for a lifetime. Professional educators seek to perform this decision-making task in a manner which assures that sound and ethical practices are followed as they review student assessment data, ascertain eligibility for services, explore placement options, and finally, identify the specific program which best suits the student's instructional and related service needs. The emphasis, then, of these Stage II CAPP materials is on *process* as well as *product*, rather than on product alone. The PPT Meeting Agenda is structured to assure that our actions as professional educators culminate in the best decisions for children.

These directions are to be studied by both the Stage II Coordinator and the Recorder prior to the PPT Meeting. Though this manual is for both, the distinction of role is clear. The *coordinator* is responsible for conducting the PPT meeting in an orderly and systematic manner and for facilitating the group decision-making process. The *recorder*, in addition to functioning as an active member of the PPT, must capture all discussion and decisions in writing on the agenda form.

STAGE II PERSONNEL

Following the referral of a student for Stage II services, several individuals will share the responsibility for . . .

- diagnosing the student's psychoeducational and/or medical strengths and weaknesses
- meeting with an interdisciplinary team for the purpose of sharing student evaluation data
- determining the student's eligibility for special education services
- selecting broad educational goals which address the identified needs of the student
- committing educational and related resources which are required to assist the student in realizing success
- identifying the most appropriate educational placement and the instructional and related services personnel responsible for implementing the student's program
- evaluating the student's progress toward attaining the goals set for him and evaluating the school's effort toward providing the required services
- transferring this assessment and placement information to the instructional staff responsible for implementing the student's individualized education program

The roles described on the following pages were designed to be filled by personnel from within the school building, where planning and placement activities typically occur. Specific personnel have not been selected to fill each role, thus allowing local districts and building personnel to assign staff in the manner which best utilizes individual skills and talents.

Role assignment options. An individual may be responsible for more than one role, or the tasks listed under only one role in this model may be assigned to two or more staff members. Though this flexible arrangement will not alter the effectiveness of the CAPP model, it is strongly suggested that individual responsibility for each and every task be firmly understood.

Interdisciplinary team approach. The culmination of Stage II activities is the interdisciplinary Planning and Placement Team Meeting. It is recognized within the field of education that the interdisciplinary team approach increases member awareness of available service options and stimulates the sharing of ideas and concerns, thereby enhancing the quality and appropriateness of the decision. It is toward this goal of responsible decisions regarding every student's educational placement and program that Stage II activities are designed.

Planning and Placement Team membership. State guidelines require that the Planning and Placement Team "include representatives of the administrative, instructional, and pupil personnel staff". (General Guidelines for Special Education Programs, Sept., 1974, p. 4) Administrative guidelines stipulate that parents must be notified of the pending Planning and Placement Team Meeting and must be invited to attend.

New federal regulations (Public Law 94-142) require the school district to insure that each individualized education plan (IEP) meeting includes the following participants:

- a school district representative (other than the child's teacher) who is qualified to supervise special education services,
- the child's special and/or regular education teacher(s), who are responsible for implementing the IEP,
- the child's parents,
- the child (when appropriate), and
- other individuals at the discretion of the parents or school district.

Since the Planning and Placement Team initiates the individualized education program for the child who has been determined eligible for special education and related services, it is critical that these individuals be included in the PPT membership.

The following pages describe the tasks to be performed by these individuals as they fill their PPT roles.

ROLES AND RESPONSIBILITIES

Coordinator

The Coordinator has ultimate responsibility for Stage II activities. He/she may assign one or more of the following tasks to PPT members when appropriate and feasible, but should monitor all activities to assure that they are completed.

Administrative Tasks

- Reviews Stage I student data
- Assures that decisions are made regarding further testing
- Assigns staff members to tasks
- Informs parent(s) of time and place for PPT meeting
- Schedules PPT meeting with school, medical, and other agency personnel
- Conducts meeting
- Schedules date for PPT review of the student's progress and placement

Communication Tasks

- Assigns staff to present student assessment data to parents and PPT members prior to or during the Planning and Placement Team Meeting
- Assigns staff member to communicate PPT deliberations and decisions to parents if they are unable to attend the meeting
- Assigns staff member to communicate PPT conference data to instructional personnel who will be responsible for developing and implementing the educational plan within the regular and/or special education program
- Communicates decision of the Planning and Placement Team to the central office

Procedural Safeguard Tasks

- Assures that nondiscriminatory testing procedures are utilized in the evaluations/assessments of the student
- Notifies the parents of their rights to review all data and to secure an independent evaluation if they so desire
- Assures that confidentiality of child data is maintained and that parental permission is obtained prior to the release of information
- Involves the parents as active participants in the planning and placement process whenever possible
- Assures that the handicapped child is educated in the least restrictive environment
- Provides written prior notice in the native language of the parents regarding the educational placement of their child
- Obtains written permission from the parents prior to placement of child in special education

Recorder

- Enters all deliberations and decisions reached during the PPT meeting on the Agenda Form
- Assures that all recorded information accurately and adequately reflects the statements and findings of the Planning and Placement Team
- Reads the recorded placement decision and rationale statement to the group prior to asking for members' signatures

Appraisal Specialist

- Administers formal and informal testing to the referred student in a clinical setting and/or in the student's classroom environment
- Reports all findings in written form to Coordinator
- May communicate new child data to parent(s) prior to or during the PPT meeting
- Presents assessment/evaluation data to PPT members during conference

Medical Specialist

- Administers appropriate diagnostic tests to referred student
- Reports all findings in written form to Coordinator
- Presents data to PPT members during meeting

Special Education Teacher, Counselor, Social Worker, Speech Clinician

- Administers formal and/or informal tests to referred student when information is needed which requires his/her expertise
- Reports all findings in written form to Coordinator
- Presents data to PPT members during meeting

Regular Education Teacher

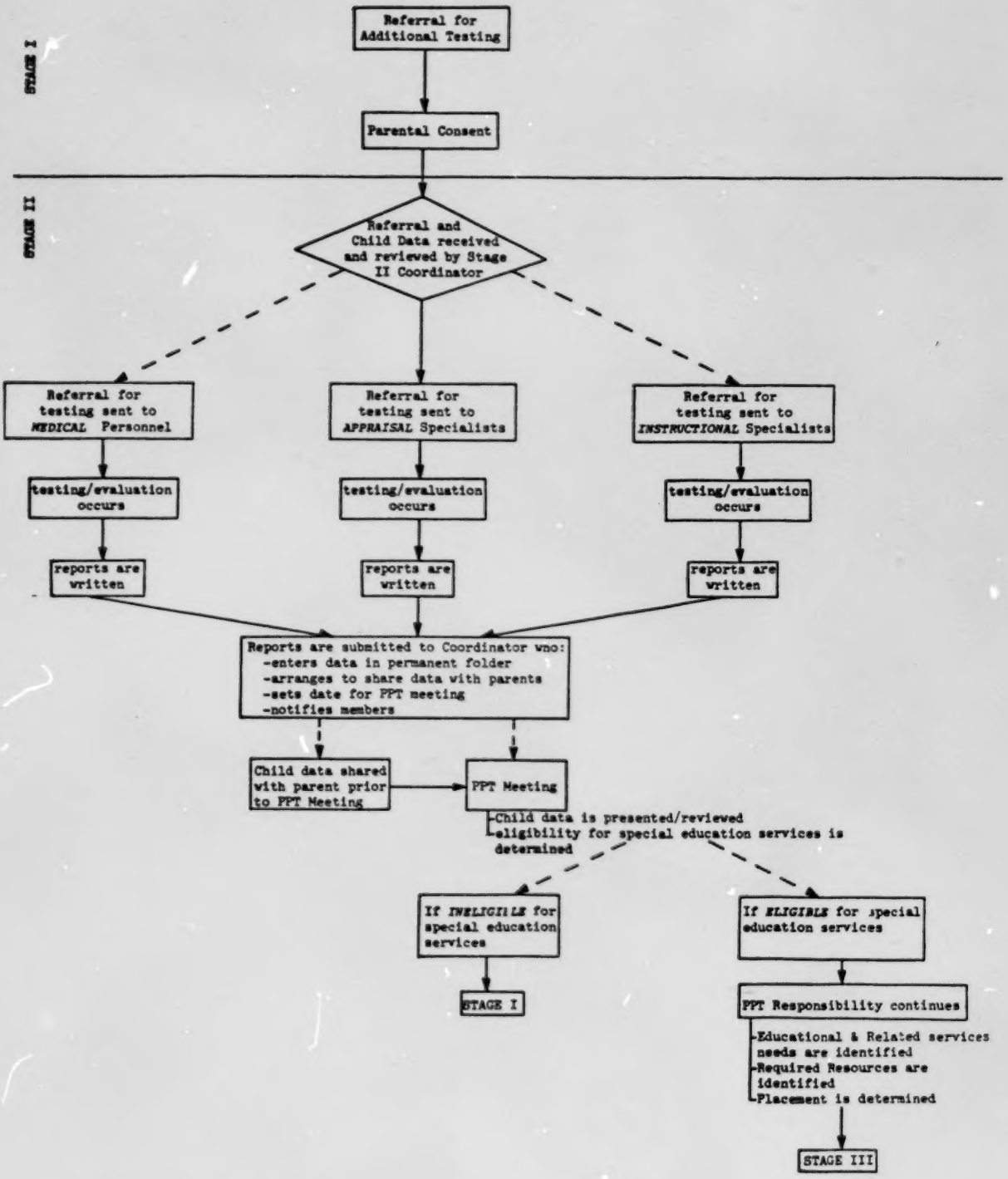
- Administers formal and/or informal tests to the referred student when information is needed which requires his/her expertise
- Reports all findings in written form to Coordinator
- Presents data to PPT members during meeting
- Summarizes reason for referral and previous instructional strategies utilized with student if such information is requested by Coordinator

Parent

- Assists Coordinator in scheduling the PPT meeting at a mutually agreed upon time and place
- Meets with Coordinator, Appraisal Specialist, and/or instructional staff prior to or during PPT meeting to review assessment/evaluation data gathered during Stage II
- Attends PPT meeting and actively participates in discussions and decisions
- Provides relevant information about child to PPT members
- Signs parental permission form if student requires special education services and if parent agrees to placement
- Assists Coordinator in scheduling time and date for review of child's placement and program

Student

- Assists PPT members by discussing his/her educational needs as he/she views them
- Lists service alternatives which he/she prefers
- Commits him/herself to the alternative selected


STAGE I
Referral for Additional Testing
Parental Consent
STAGE II
Referral and Child Data received and reviewed by Stage II Coordinator
Referral for testing sent to MEDICAL Personnel
Referral for testing sent to APPRAISAL Specialists
Referral for testing sent to INSTRUCTIONAL Specialists
testing/evaluation occurs
testing/evaluation occurs
testing/evaluation occurs
reports are written
reports are written
reports are written
Reports are submitted to Coordinator who:
-enters data in permanent folder
-arranges to share data with parents
-sets date for PPT meeting
-notifies members
Child data shared with parent prior to PPT Meeting
PPT Meeting
-Child data is presented/reviewed
-eligibility for special education services is determined
If INELIGIBLE for special education services
If ELIGIBLE for special education services
STAGE I
PPT Responsibility continues
-Educational & Related services needs are identified
-Required Resources are identified
-Placement is determined
STAGE III

STAGE II PROCEDURES

FORMS FOR SHARING STUDENT ASSESSMENT DATA

The Planning and Placement Team shares the responsibility for making decisions regarding the student's eligibility for special education services as well as decisions regarding the most appropriate educational environment in which the student can learn and experience success. These are crucial decisions for the student, his family, and for the school. Therefore, the PPT must make every effort, both individually as members and collectively as a team, to become thoroughly acquainted with the student's instructional needs and service requirements.

Though *optional,* the following forms were developed to facilitate the sharing of student assessment data with members of the Planning and Placement Team prior to and during the meeting (Appendix B contains examples of these forms).

I. STUDENT EVALUATION SUMMARY

Purpose:

- To provide the Coordinator with a summary of data for each category in which the student was assessed
- To assist each evaluator in clarifying his/her judgement of the student's performance and to facilitate the evaluator's ability to communicate his/her professional judgement to others

Who Completes the Form?

Each educational, medical, and/or other professional who was assigned the task of assessing the referred student during Stage II

Submitted to Whom?

The Stage II Coordinator

I. STUDENT EVALUATION SUMMARY

INFORMATION SUMMARY SHEET

Student Assessed: _____
(last name) (first name) (middle name)

Date of Birth: _____ Age: _____ Grade: _____

Assessed By: _____
(name) (title)

List tests/scales/medical exams/observation instruments administered:

_____ _____
_____ _____
_____ _____
(test) (date)

Describe strengths which should be considered in planning an instructional program for this student.*

_____
_____

Describe areas of concern which seem to require services/resources.*

_____
_____

_____ _____
(signature) (date)

*DESCRIBE IN OBJECTIVE LANGUAGE.

Instructions

1. Identify the student you have assessed by writing his/her name (last name first), date of birth, age, and grade.
2. Identify yourself by indicating your name and title.
3. List all assessment instruments that you used with this student and give the testing date. Please indicate *all* tests administered, including formal psychological examinations, informal classroom observations, visual screening examinations, home visits, etc.
4. In *objective language,* describe strengths that you have identified in this student which should be considered in planning instructional strategies.
5. In *objective language,* describe those areas of concern which you have identified as requiring special services, resources, or attention.
6. Sign and date the form.

II. SUMMARY REPORT OF STAGE II EVALUATIONS

Purpose: • To provide a simple, one-page format for sharing student assessment data with all individuals who will attend and participate in the Planning and Placement Team Meeting.

Who completes the Form?

The Stage II Coordinator

Submitted to Whom?

All PPT members prior to the meeting

Parents in a conference setting prior to or during the PPT meeting

Student Name			Date of Report
Date of Birth	Age		Compiled By
School	Teacher		Title

SUMMARY REPORT OF STAGE II EVALUATIONS

Check one: ___ Educational ___ Psychological ___ Observational ___ Vocational ___ Developmental/Family History ___ Medical ___ Parental ___ Other:_____	Major Strengths: Areas of Concern:
Check one: ___ Educational ___ Psychological ___ Observational ___ Vocational ___ Developmental/Family History ___ Medical ___ Parental ___ Other:_____	Major Strengths: Areas of Concern:
Check one: ___ Educational ___ Psychological ___ Observational ___ Vocational ___ Developmental/Family History ___ Medical ___ Parental ___ Other: _____	Major Strengths: Areas of Concern:
Check one: ___ Educational ___ Psychological ___ Observational ___ Vocational ___ Developmental/Family History ___ Medical ___ Parental ___ Other:_____	Major Strengths: Areas of Concern:

Instructions to Coordinator

1. Identify the student by writing his/her name, date of birth, age, the school s/he is attending, and his/her teacher (if appropriate) in the spaces provided.
2. Indicate the date of the report in the top right hand corner. Also give your name and title as the person who compiled the information.
3. Each section of the Summary Report will be taken directly from the Student Evaluation Summary forms which have been submitted by all educational, medical, and other professionals who assessed the referred student in Stage II. If at all possible, transfer the exact wording from the Student Evaluation Summary to the Summary Report of Stage II Evaluations.
4. As you transfer the data from each of the Student Evaluation Summary sheets, check the appropriate category of information in the box to the left. For example, information regarding the student's performance on a visual screening examination should have "Medical" checked in the box on the left. Information regarding the student's performance on an individually administered intelligence test should have "Psychological" checked in the box on the left.
5. Make enough copies of this report to share with each member of the Planning and Placement Team and distribute them at least two days prior to the meeting.
6. Remind all members that they are to bring their copies of the Summary Report to the PPT meeting where they will be collected and placed in the student's folder. Confidentiality of records must be respected in all cases.

Sharing Information With Parents

The forms offer an excellent mechanism for sharing assessment information with the student's parents in a conference setting. It is recommended that the forms be shared with parents in a conference setting *only*. If school officials decide to utilize these forms for the purpose of sharing information with parents without benefit of professional consultation in a face to face situation, considerable caution must be observed.

In conclusion . . .

Many schools have excellent mechanisms for sharing summary assessment data with PPT members and with parents. These forms represent only one of the many effective ways to assure that each person charged with making a decision regarding a student's educational future is well acquainted with all relevant data needed to reach a knowledgable decision.

The following pages describe the Planning and Placement Team Meeting Agenda, which provides the structure to assist each member in fulfilling his/her role on the PPT and to facilitate the team effort toward arriving at this crucial decision.

PLANNING AND PLACEMENT TEAM MEETING AGENDA

Purpose:
- To provide a format for the PPT meeting which will assure that activities are performed in accordance with state and federal guidelines
- To provide a formalized, written record of the PPT deliberations and decisions
- To provide a structure which facilitates the involvement and inclusion of parents and instructional personnel in the PPT process
- To provide a vehicle for communicating information to the student's parents and to the instructional staff responsible for implementing his/her individualized educational program

Who completes this form?

The Stage II Coordinator directs the PPT meeting by following the agenda format. The Recorder completes the actual form during the PPT meeting.

Submitted to Whom?

The original form is kept in the student's permanent folder.

Copies are submitted to the instructional staff responsible for implementing the student's educational program, and

The student's parents (if the school decides to utilize this vehicle for providing information regarding the PPT meeting and the student's placement to parents).

In accordance with "Confidentiality of Records and Protection of Children's Rights" (PL 94-142), the Planning and Placement Team shall adhere to procedures outlined to protect the confidentiality of students' records. Care should be taken to insure that these materials are distributed to appropriate personnel *only*.

SECTION I. IDENTIFYING INFORMATION

Purpose:
- To assure that the referred student, his school, and school personnel responsible for coordinating and recording Stage II activities are identified

Note: This section may be completed by either the Coordinator or the Recorder prior to the meeting.

Instructions

1. Write the student's name (last name first), date of birth, age, race, primary language, name of parent or guardian, his/her address, and telephone number in the spaces provided.
2. Identify the school by placing the name in the space provided. Also identify the Teacher, Case Coordinator, and the Recorder by name and title.

SECTION II. INTRODUCTION

Purpose:
- To provide a common frame of reference for all PPT members regarding the purpose of the meeting

Instructions

Coordinator

1. State the purpose of the meeting clearly and briefly, or ask the student's teacher to do so.

To provide a common frame of reference for all PPT members, please state the reason for this meeting.

to identify strategies and resources for meeting Mary's educational needs

OR

to review Johnny's progress in the special education program this past school year

Recorder

1. Write this statement in the space provided.

SECTION III. PRESENT LEVEL OF EDUCATIONAL FUNCTIONING

Purpose:
- To inform PPT members about the student's prior educational history and current level of educational performance
- To assure that all members have a common basis for consideration of (a) the student's referral for Stage II services or (b) review of the student's present placement in a special education tion program
- To actively involve the instructional staff in the PPT meeting

Instructions

Coordinator

1. Ask the regular education teacher, special education teacher and/or the referring individual (in the case of an initial referral for Stage II services) to present the information required under this section to the PPT members in brief summary fashion.

Recorder

1. Write this information in the space provided.
2. *For initial referrals only* — Information regarding the student's present level of educational performance is documented in the CPW form (Classroom Planning Worksheet, Stage I). Reference this form whenever appropriate rather than rewriting the information.

SECTION IV. SUMMARY OF STUDENT ASSESSMENT/EVALUATION INFORMATION

Purpose:
- To provide a systematic means of sharing information gathered during Stage II which should *reduce*
  - time required
  - redundancy
  - tendency to share only fragmented data
  - likelihood of neglecting one of the critical areas of information
  - anecdotal information which has no relation to the needs or strengths of the student
- To provide written documentation of comments made by group members about the information shared
- To provide a means of involving parents actively in the information sharing phase of the planning and placement process

Instructions

Coordinator

1. Ask each PPT member who has assessment/evaluation information to present and summarize his/her findings to the group.
2. If any educational, medical, or other professional who has gathered assessment information regarding the student is *not* present, share the submitted written report with the group.
3. It would be especially helpful to the Recorder to follow the sequence of this section — but it is not necessary. What *IS* necessary is that each professional be given the opportunity to share all relevant data during the PPT meeting and it is the responsibility of the Coordinator to see that this sharing is accomplished in a systematic and orderly manner.
4. Parents are to be active partners in the process of determining their child's educational needs and placement. You have the responsibility of assuring that this role is protected and encouraged throughout the meeting.

Recorder

1. Document any comments or discussion by members of the Planning and Placement Team in the comment section following each category.
2. In Section III there is a specific place to record the parents' response to the information discussed and to record any additional information they want to share with the other PPT members.

SECTION V. CONFIRMING/CONFLICTING INFORMATION

Purpose:
- To provide a structure for identifying conflicting evidence and for documenting the resolution of the conflict

Instructions

Coordinator

1. Have the Planning and Placement Team members determine whether any source(s) of information *conflicts* with the PPT interpretation of the major body of assessment/evaluation data.

Check any source(s) of information which CONFLICTS with PPT interpretation.

____	Educational	____	Speech and Language
_X_	Psychological	____	Prevocational/Vocational
____	Adaptive Behavior	____	Medical
____	Observational	____	Other Relevant Information _____
____	Developmental History	____	Parent/Family Information

2. If a conflict is noted, it must be resolved if possible.

Resolve any conflicts. Give brief rationale.

Psychological exam suggests child is within an EMR range for his age group in abstract concepts. Classroom performance, observations and parents note that he demonstrates mastery at no more than 1 year below age level. Accept performance over diagnostic - believe language limitation may have inhibited his responses.

Recorder
1. Check any sources of information that the PPT has determined *conflicting*.
2. If a source of information has been checked as conflicting data, provide a brief rationale for the resolution of conflict.

SECTION VI. ELIGIBILITY FOR SPECIAL EDUCATION SERVICES

Purpose:
- To determine on the basis of available student data and specific eligibility criteria whether the student is eligible to receive special education services
- To provide information necessary for state and federal reporting purposes

Instructions

Coordinator
1. Ask the PPT to determine whether the student is eligible for special education services.
2. If the student is determined eligible, ask the PPT to identify his/her primary handicapping condition.

Is this student eligible to receive special education services? YES _X_ NO___

If YES, indicate the classification of the primary handicapping condition assigned to this student.

Learning Disabled

Recorder
1. Indicate whether the student was determined eligible by checking *YES* or *NO*.
2. If the answer is *yes*, indicate the classification of the primary handicapping condition assigned to the student.

SECTION VII. REVIEW OF SERVICES PROVIDED

Note: This section is for the review of the student's progress relevant to PPT/IEP goal statements developed during the previous meeting. Disregard this section if this represents the student's *initial* PPT meeting.

PART A. REVIEW OF SERVICES PROVIDED

Purpose:
- To review and evaluate the school's efforts toward providing those services which were specified for the student during the previous PPT/IEP meeting.
- To furnish information necessary for administrative evaluation of the adequacy of the present delivery system.

Instructions

Coordinator

1. Provide the team with the *instructional and related services* section (see page 6 of the PPT Agenda) which was developed during the previous PPT meeting.
2. Ask the PPT members to discuss the extent to which each service listed was provided to the student during the past instructional cycle. Determine a group evaluation of the school's efforts toward providing those services which were specified.

X. INSTRUCTIONAL AND RELATED SERVICE RESOURCES REQUIRED TO MEET STUDENT NEEDS						XI. SPECIFIC PLACEMENT INFORMATION				VII.A. Review of Services Provided				
SERVICE DESCRIPTOR	NEED #	SCHEDULING	STARTING DATE	PERIOD OF DURATION	REVIEW DATE	PERSONNEL RESPONSIBLE	TITLE	ROOM	% OF TIME	Provided as Stated	Provided to a GREATER degree than stated	PROVIDED to a LESSER degree than stated	Service Exists-but not avail. to student	Service does not Exist
Resource Rm.	*1 & 2*	*5 hr/wk*	*9/1/77*	*9 mo.*	*5/77*	*Jean Smith*	*spec. ed. teacher*	*8*	*10%*	X				
Physical Ther.	*3*	*1 hr/wk*	*9/1/77*	*3 mo.*	*5/77*	*Pete Jones*	*PT*	*22*	*2%*		X			
Speech Ther.	*4*	*1 x/wk.*	*9/1/77*	*9 mo.*	*5/77*	*Pat Bell*	*ST*	*7*	*2%*					X

Recorder

1. Indicate the group evaluation of services rendered by checking the appropriate box in the last column.

PART B. REVIEW OF STUDENT PROGRESS

Purpose:
- To review and evaluate the student's progress in achieving the goals established for him/her by the previous Planning and Placement Team
- To furnish information which must be considered by the Planning and Placement Team prior to the determination of additional educational and related service needs which will be addressed during the coming implementation cycle

Instructions

Coordinator
1. Provide the team with the Need Statement Planning Worksheets developed during the previous PPT meeting.
2. Ask the instructional staff to discuss and evaluate the student's progress toward achieving each goal, utilizing the Stage III evaluation format.

FOR REVIEW ONLY

REVIEW OF STUDENT PROGRESS: _X_ Exceeded Criteria* ___ Met Criteria ___ Did not meet Criteria*

*Explain: *Johnny progressed two months farther than anticipated in word attack skills.*

RECOMMENDATION:
_X_ No longer requires special assistance to meet need
___ Continue Need Statement
___ Modify Need Statement

COMMENTS: *Johnny should be able to read quite well with the slower reading group in his fourth-grade class next year.*

Recorder
1. On each separate worksheet, in the box marked FOR REVIEW ONLY, indicate the team's evaluation of the student's educational progress during the past instructional cycle. (The instructional cycle shall not exceed one year without a formal review by the PPT.)

If it is determined that this student *no longer requires special education services*, complete and sign the SPECIAL EDUCATION DISMISSAL form. Attach this form to the PPT Agenda. Enter Code #00 on the Disposition Cover Sheet.

Note: The Special Education Dismissal form and instructions for its completion are provided in Appendix C.

SECTION VIII. DETERMINATION OF NEED

Purpose:
- To provide a description of all educational and related service needs of the student as suggested by the PPT members
- To provide a means of indicating which needs the committee will address in the student's individualized educational program (IEP) during the established period of time (not to exceed one year)

Instructions

Coordinator
1. Ask the PPT members to suggest *all* of the student's most important special service needs.
2. Have them decide which needs will be addressed in the student's IEP. The number of selected needs must not exceed the number which the student can be expected to deal with effectively within one academic year.

Recorder
1. List all of the student's special service needs as suggested by the Planning and Placement Team.
2. Number only those needs which the Planning and Placement Team has selected to address in its formulation of the student's individualized education program for the coming year.

LIST the student's most important special skill needs as suggested by the PPT. A Need Statement represents a long-range educational goal.

NEED STATEMENT	NUMBER SELECTED NEEDS****
increase attention span	*1*
develop word attack skills	*2*
increase reading comprehension	*3*
develop strength in lower limbs	*4*
develop pre-vocational skills	

****SELECT & NUMBER only those needs which the PPT will address in its formulation of the student's individualized educational program for the coming year. The number of selected needs must not exceed that which the student can be expected to deal with effectively within one academic year.

SECTION IX. NEED STATEMENT PLANNING WORKSHEET

Purpose:
- To provide a worksheet for the Planning and Placement Team's formulation of evaluation criteria and evidence needed to show student progress in each selected area of need. These strategies will be developed more specifically during Stage III.
- To provide a worksheet to facilitate the review process which follows the completion of the instructional cycle (instructions for the review section are on page 16).

Instructions

Coordinator

1. For each need to be addressed in the IEP, have the PPT determine criteria which will reflect the student's progress in that area and the type of evidence needed to show that the student has met the criteria.

Recorder

1. Identify the specific need to be discussed by indicating its number (assigned by the team members in Section VIII) and by paraphrasing the need statement in the space provided.

NEED STATEMENT: *increase attention span*

\# *1*

2. List the criteria for review of the need statement.

Criteria for Review of Need Statement: *demonstrates correct responses 75% of the time*

3. Document the type of evidence which is needed to show that the student has met the criteria.

Type of Evidence needed to show progress: *as measured on weekly tests and teacher charting of correct/incorrect responses*

SECTION X. INSTRUCTIONAL AND RELATED SERVICE RESOURCES REQUIRED TO IMPLEMENT SELECTED STRATEGIES

Purpose:
- To provide a "statement of specific educational services needed by the child, (determined without regard to the availability of those services) including a description of: (1) all special education and related services which are needed to meet the unique needs of the child . . ." (Connecticut State Dept. of Education Public Law 94-142)
- To encourage PPT members to investigate and consider community agency resources which might benefit the student and increase the cost-effectiveness of the program
- To provide a structure for recording suggested ways for the parents or other family members to supplement and assist the school program.

Instructions

Coordinator

1. Ask the PPT members to identify instructional and related service resources which are required to meet the student's educational needs. Determine the date the service will begin, the period or duration of the service, and the date for review of the service. They may also suggest schedules for the utilization of these resources, but this is optional*.

*The PPT may prefer to have the instructional staff determine scheduling during the Instructional Planning Meeting set for Stage III.

X. INSTRUCTIONAL AND RELATED SERVICE RESOURCES REQUIRED TO MEET STUDENT NEEDS

SERVICE DESCRIPTOR	NEED #	SCHEDULING	STARTING DATE	PERIOD OF DURATION	REVIEW DATE
Resource Room	*1 & 2*	*5 hr/wk*	*9/1/77*	*9 mo.*	*5/77*
Physical Ther.	*3*	*1 hr/wk*	*9/1/77*	*3 mo.*	*5/77*
Speech Ther.	*4*	*1 hr/wk*	*9/1/77*	*9 mo.*	*5/77*

2. Consider services that may be provided by a supportive agency in the community. Many agencies are mandated to provide specialized services which would enhance the educational programs of children and youth in the State of Connecticut.

ADDITIONAL RESOURCES REQUIRED:

Community Agency Resources

Describe Required Service: *large type textbooks*

Agency Providing Service: *Commission for the Blind*

Contact Person: *Mr. John Smith*

3. Explore ways in which the parents or other family members can supplement and assist the school program.

Family Involvement Resources

Describe activities provided for by family: *materials will be sent home and mother will tutor Michael in voc. skills 1 to 2 hours/week*

Recorder

1. List the required resources in the spaces provided. To the right of each resource listing indicate the number of the need statement which will be met by that resource.
2. In the next column, indicate the suggested scheduling for each service to be provided if the PPT has set schedules at this time. Indicate the date the service will begin and the period or duration of the service and enter the date for review of the service.
3. Indicate which services may be provided by a supportive agency in the community.
4. Record any suggestions from the parents or other PPT members regarding ways in which the parents or other family members can supplement and assist the school program.

SECTION XI. SPECIFIC PLACEMENT INFORMATION

Purpose:
- To assign specific instructional and related service personnel responsibility for providing services to the student
- To provide information required for reports to state and federal agencies

Instructions

Coordinator

1. Have the PPT determine the appropriate instructional personnel for each service, where the service is to be provided, and the percentage of time the student will receive that service.

X. INSTRUCTIONAL AND RELATED SERVICE RESOURCES REQUIRED TO MEET STUDENT NEEDS						XI. SPECIFIC PLACEMENT INFORMATION			
SERVICE DESCRIPTOR	NEED #	SCHEDULING	STARTING DATE	PERIOD OF DURATION	REVIEW DATE	PERSONNEL RESPONSIBLE	TITLE	ROOM	% OF TIME
Resource Rm.	*1 & 2*	*4 hr/wk*	*9/1/77*	*9 mo.*	*5/77*	*Jean Smith*	*spec. ed. teacher*	*8*	*10 %*
Physical Ther	*3*	*1 hr/wk*	*9/1/77*	*3 mo.*	*5/77*	*Pete Jones*	*PT*	*22*	*2 %*
Speech Ther.	*4*	*1 hr/wk*	*9/1/77*	*9 mo.*	*5/77*	*Pat Bell*	*ST*	*7*	*2 %*

2. Ask the PPT to specify the amount of time the student will spend in the regular instructional program in terms of percentage of time and number of hours.

Describe the extent to which student will participate in Regular Education:

25 % of Time *10* Number of Hours/Week

Recorder

1. List assigned instructional personnel by name and by title.
2. If appropriate, provide the location of the service by indicating the room number.
3. Indicate the percentage of time the student will receive each educational service.
4. Indicate the extent to which the student will participate in the regular education program by providing the percentage of time and the number of hours he/she will receive regular education services.

SECTION XII. PLACEMENT SUMMARY

Purpose:
- To provide a summary of and rationale for the student's placement
- To establish a date for the review of the student's placement and his/her individualized education program
- To provide a format for signatures of all PPT members, including those who may hold dissenting opinions

Instructions

Coordinator

1. Have the PPT decide when the student's program is to become effective and when the program and the student's progress are to be reviewed. The review date must be within one year from the date of this PPT meeting.
2. Ask the PPT to compose a brief rationale for the placement decision.

Provide a brief rationale for this placement decision.

At this time, Bobby requires instruction on an individual one-to-one basis in a special environment which reduces distraction and provides constant reinforcement. This is best provided in a special education resource room.

3. The Recorder will now read the placement decision and rationale for the PPT members.
4. Have all PPT members sign this document and indicate their titles.
5. If any member disagrees with the decision of the group, that member must sign under the Dissenting Opinion column and must also place his/her title to the right of the signature. The dissenting member(s) must briefly indicate the reason for dissent. If the dissenting member is the student's parent, he/she must be fully informed of the right to appeal.

Recorder

1. Describe the location of the student's educational placement by indicating the building and program he/she has now been assigned to.
2. Fill in the student's name, the meeting date(s), the date the program becomes effective, and the review date in the spaces provided.
3. Document the rationale for the placement decision.
4. Read the placement decision and rationale for the PPT members.
5. Return the Agenda to the coordinator.

Appendix A

REQUIREMENTS AND SUGGESTED FORMS FOR PARENTAL NOTIFICATION AND CONSENT

Connecticut State Department of Education guidelines specifically require the involvement of each child's parents in the Planning and Placement Team as core members and in the development of the student's individualized education program (IEP).

> "At least three school days prior to convening of the PPT, preferably five to seven calendar days if a weekend or holiday is included, parents shall be advised in writing in their dominant language of their rights to be a participating member of the team. Notification should include the place and purpose of the meeting at a mutually agreed-upon time and place." (Connecticut State Department of Education)

Each school district must provide and maintain documentation of its attempts to involve parents as active members of the Planning and Placement Team.

Due process procedures further require that school officials obtain 'informed consent' from each child's parents at three (3) separate points. They are:

(1) Prior to the administration of individual assessment procedures, (Stage I)
(2) Prior to special education placement (Stage II), and
(3) Prior to major changes in the child's program (Stage II).

Parents also must be informed of the Planning and Placement Team decision regarding their child's continued placement in special education.

The CAPP model provides sample correspondence to be utilized at each of the various required points. It is recognized, however, that each district has developed and is utilizing forms which may better suit its needs.

DOCUMENTATION OF ATTEMPTS TO SEEK PARENT/GUARDIAN PARTICIPATION

STUDENT: _____

DATE OF BIRTH: _____

PARENT/GUARDIAN: _____

ADDRESS: _____

PHONE: _____

DATE	TYPE OF COMMUNICATION	PURPOSE	Made contact	Did not make contact	Received reply requested	Did not receive reply requested	Attended meeting/conference	Did not attend meeting	Other

1. Enter the date of each contact or attempt to contact the student's parent or guardian.
2. Describe the type of communication. Example: letter, phone, conference.
3. Briefly describe the purpose for contacting the student's parent or guardian. Example: evaluation conference, PPT meeting, IEP development conference . . .
4. Indicate the outcome by checking the appropriate column.

_____
(Date)

Dear _____ ,

The education evaluations which you recently approved for _____
(Student's Name)
are completed. We would like the opportunity to meet with you to discuss these evaluation findings and to discuss any information regarding your child that you would like to share with us.

This conference has tentatively been set for _____ *(Day)*, _____ *(Date)*, at _____ *(Time)* A.M./P.M. at _____ *(Location)*.

Following this conference, we will set the date for a Planning and Placement Team meeting. The Planning and Placement Team will determine whether _____ *(Student's Name)* is eligible for and requires special education and/or other related services. You are encouraged to be an active member of this team.

_____
(Signature)

_____
(Title)

TEAR OFF AND RETURN THIS PORTION OF THE LETTER

I will be able to attend the conference scheduled for this time and date.

_____
(Signature)

I will NOT be able to attend a conference scheduled for this time and date. However, I do wish to meet on a more convenient date. Please call me at _____ *(Telephone Number)* between _____ *(Hours)* to arrange another meeting date.

_____
(Signature)

I waive my right to attend a conference for the purpose of sharing evaluation information about my child.

_____
(Signature)

_____
(Date)

Dear _____,

In order for the educational program to be effective for each student, it is important that school personnel and parents work together as a team. For this reason, parents are considered important members of the PPT which will review the student's educational strengths and areas of concern and determine his/her eligibility for placement in a special education program.

You are invited to attend and to participate in the Planning and Placement Team Meeting concerning your child's educational needs tentatively scheduled for _____ *(Time)* on _____ *(Date)*

at _____ *(Location)*.

Please make every effort to attend this meeting.

Sincerely,

_____
(Signature)

_____
(Title)

TEAR OFF AND RETURN THIS PORTION OF THE LETTER

I will be able to attend the Planning and Placement Team Meeting scheduled for this time and date.

_____
(Signature)

.....

I will not be able to attend the Planning and Placement Team Meeting scheduled for this time and date.

I DO wish to meet on a more convenient date. Please call me at _____ *(Telephone Number)* between _____ *(Hours)* to arrange another meeting date.

_____
(Signature)

.....

I waive my right to attend the Planning and Placement Team Meeting regarding my child's educational program needs.

_____
(Signature)

PARENTAL CONSENT FOR SPECIAL EDUCATION PLACEMENT

This is to indicate that I give my permission to _____
(School District)

to place my child _____ in the _____
(Student's Name)

special education program. I understand that this program is designed to meet his/her unique instructional and/or related service needs.

_____
(Signature)

_____
(Date)

This is to indicate that I do not give my permission to _____
(School District)

to place my child _____ in the _____
(Student's Name)

special education program.

_____
(Signature)

_____
(Date)

APPENDIX B

FORMS FOR SHARING STUDENT ASSESSMENT DATA

INFORMATION SUMMARY SHEET

Student Assessed: _____
(Last Name) (First Name) (Middle Name)

Date of Birth: _____ Age: _____ Grade: _____

Assessed By: _____
(Name) (Title)

List tests/scales/medical exams/observation instruments administered:

_____	_____
_____	_____
_____	_____
(Test)	(Date)

Describe strengths which should be considered in planning instructional strategies.*

_____

_____

_____

_____

_____

Describe areas of concern which seem to require special services/resources.*

_____

_____

_____

_____

_____

_____ _____
(Signature) (Date)

*DESCRIBE IN OBJECTIVE LANGUAGE.

_____ _____
(Student Name) *(Date of Report)*

_____ _____
(Date of Birth) *(Age)* *(Compiled By)*

SUMMARY REPORT OF STAGE II EVALUATIONS

Check one:
_____ Educational
_____ Psychological
_____ Observational
_____ Vocational
_____ Developmental/Family History
_____ Medical
_____ Parental
_____ Other: _____

Major Strengths:

Areas of Concern:

Check one:
_____ Educational
_____ Psychological
_____ Observational
_____ Vocational
_____ Developmental/Family History
_____ Medical
_____ Parental
_____ Other: _____

Major Strengths:

Areas of Concern:

Check one:
_____ Educational
_____ Psychological
_____ Observational
_____ Vocational
_____ Developmental/Family History
_____ Medical
_____ Parental
_____ Other: _____

Major Strengths:

Areas of Concern:

Check one:
_____ Educational
_____ Psychological
_____ Observational
_____ Vocational
_____ Developmental/Family History
_____ Medical
_____ Parental
_____ Other: _____

Major Strengths:

Areas of Concern:

Check one:
_____ Educational
_____ Psychological
_____ Observational
_____ Vocational
_____ Developmental/Family History
_____ Medical
_____ Parental
_____ Other: _____

Major Strengths:

Areas of Concern:

APPENDIX C

SPECIAL EDUCATION DISMISSAL FORM

DISMISSAL FROM SPECIAL EDUCATION

This is to certify that _____ no longer requires
(Student's name)
Special Education services to meet his/her educational needs. S/he will be returned to the Regular Education program on a full time basis. This decision was reached by the Planning and Placement Team on _____.
(Meeting date)

_____ _____
(LEA Representative)

_____ _____
(Teacher)

_____ _____
(Teacher)

_____ _____
(Parent/Guardian)

_____ _____
(Student, if present)

_____ _____

_____ _____
(Signatures) *(Titles)*

Dissenting Opinions:

_____ _____
(Signature) *(Title)*

Reason for Dissent: _____

_____ _____
(Signature) *(Title)*

Reason for Dissent: _____

Instructions

1. Record the student's name and the meeting date in the spaces provided.

2. Have all PPT members sign this document and indicate their titles.

3. If any member disagrees with the decision of the group, that member must sign under Dissenting Opinions and must also place his/her title to the right of the signature. The dissenting member(s) must briefly indicate the reason for dissent. If the dissenting member is the student's parent, he/she must be fully informed of the right to appeal.

EC

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

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PLANNING AND PLACEMENT TEAM MEETING AGENDA

ED 110 776

PLANNING AND PLACEMENT TEAM MEETING AGENDA

I. IDENTIFICATION INFORMATION

A. Student: _____ *(Last) (First) (Middle)*

Date of Birth: _____ Age: _____

Racial/Ethnic: _____

Primary Language: English ___ Other ___ *(Check one)*

Parent/Guardian: _____

Address: _____

Telephone: _____

B. School: _____

Teacher: _____

Case Coordinator: _____

Title: _____

Recorder: _____

Title: _____

II. INTRODUCTION

To provide a common frame of reference for all PPT members, please state the reason for this meeting (initial referral, PPT/IEP review, . . .).

_____

III. PRESENT LEVEL OF EDUCATIONAL FUNCTIONING

Describe student's current level of educational performance in the following areas:

Academic Achievement:

Social Adaptation:

Psychomotor Skills:

Self-Help Skills:

Prevocational/Vocational Skills:

IV. SUMMARY OF STUDENT ASSESSMENT/EVALUATION INFORMATION

Psychological

Comments:

Adaptive Behavior

Comments:

Observational

Comments:

Developmental History *(provided by Social Workers, Counselors, . . .)*

Comments:

Speech and Language

Comments:

Prevocational/Vocational

Comments:

Medical

Comments:

Other Relevant Information

Comments:

Parent/Family Information *(provided by parents and/or family members)*

Comments:

V. CONFIRMING/CONFLICTING INFORMATION:

Check any source(s) of information which *conflicts* with PPT interpretations.

_____ Educational	_____ Speech and Language
_____ Psychological	_____ Prevocational/Vocational
_____ Adaptive Behavior	_____ Medical
_____ Observational	_____ Other Relevant Information: _____
_____ Developmental History	_____ Parent/Family Information

Resolve any conflicts. Give brief rationale.

_____

_____

VI. ELIGIBILITY FOR SPECIAL EDUCATION SERVICES

Is this student *eligible* to receive special education services? Yes _____ No _____

If *yes*, indicate the classification of the primary handicapping condition assigned to this student.

_____

VII. REVIEW SECTION

Note: Disregard this section if this represents the student's *initial* PPT meeting.

A. Review of Services Provided

This section is for the review of the school's effort toward providing those services which were specified for the student during the previous PPT/IEP meeting.

Refer to the Instructional and Related Service Section (p. 6 of the previous PPT Agenda Form) which was developed for the student during the previous PPT meeting.
Indicate the extent to which each service was provided by placing a check in the appropriate box in the last column.

B. Review of Student Progress

This section is for the review of the student's progress toward achieving the goals expressed in the PPT/IEP Need Statements developed for him/her.

Refer to the Need Statement Planning Worksheets developed during the previous PPT meeting.
Describe the student's progress toward achieving each goal, utilizing the Stage III evaluation format.
Indicate the team's evaluation of the student's educational progress during the past instructional cycle in the box marked "For Review Only".

If it is determined that this student *no longer requires special education services*, complete and sign the Dismissal from Special Education form. Attach this form to the PPT Agenda. Enter Code #00 on the Disposition Cover Sheet.

VIII. DETERMINATION OF NEED

List the student's most important skill needs as suggested by the PPT. A Need Statement represents a long-range educational goal.

NEED STATEMENT	NUMBER SELECTED NEEDS***

***Select* and *number* only those needs which the PPT will address in its formulation of the student's individualized educational program for the coming year. The number of selected needs must not exceed the number which the student can be expected to deal with effectively within one academic year.

For each selected Need Statement, complete a separate Need Statement Planning Worksheet and attach to this Agenda form.

X. INSTRUCTIONAL AND RELATED SERVICE RESOURCES REQUIRED TO MEET STUDENT NEEDS

XI. SPECIFIC PLACEMENT INFORMATION

VII(A). REVIEW OF SERVICES PROVIDED

SERVICE DESCRIPTOR	NEED NO.	SCHEDULING	STARTING DATE	PERIOD OF DURATION	REVIEW DATE	PERSONNEL RESPONSIBLE	TITLE(S)	ROOM	PERCENT OF TIME	Provided as stated	Provided to a *greater* degree than stated	Provided to a *lesser* degree than stated	Service exists but was not available to student	Service does not exist

ADDITIONAL RESOURCES REQUIRED:

Community Agency Resources

Describe Required Service: _____

Agency Providing Service: _____

Contact Person: _____

Family Involvement Resources

Describe activities provided for by family: _____

_____

Describe extent to which student will participate

Regular Education: _____ percent of time and/or _____ number of hours per week.

XII. PLACEMENT SUMMARY

Location: Building: _____

Program: _____

This is to certify that _____
(Student's name)

is eligible for and requires the above named program for meeting his/her educational needs in the most appropriate manner. This decision was reached by the Planning and Placement Team on

_____ .
(Meeting date)

Provide a brief rationale for this placement decision.

_____

_____

This placement and the student's progress toward attaining the educational goals set for him/her will be reviewed on _____ .
(Review date)

Recorder will now read placement decision and rationale statement for PPT members before record is signed.

_____ *(LEA Representative)*	_____
_____ *(Teacher)*	_____
_____ *(Teacher)*	_____
_____ *(Parent/Guardian)*	_____
_____ *(Student, if present)*	_____
_____ *(Signatures)*	_____ *(Titles)*

Dissenting Opinions:

_____ _____
(Signature) *(Title)*

Reason for dissent: _____

_____ _____
(Signature) *(Title)*

Reason for dissent: _____

These materials were developed in cooperation with the Connecticut State Department of Education, Bureau of Pupil Personnel and Special Educational Services under Special Act 74-100, and the U.S. Office of Education, Bureau of Education for the Handicapped, Division of Innovation and Development, State Program Studies Branch.